DOCUMENT RESUME

ED 337 419 SP 033 245

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TITLE The Changing Role of Headteachers in England and Wales.
PUB DATE Apr 91
NOTE 35p.; Paper presented at the Annual Meeting of the American Educational Research Association (Chicago, IL, April 3-7, 1991).
PUB TYPE Speeches/Conference Papers (150)

EDRS PRICE MF01/PC02 Plus Postage.
DESCRIPTORS *Administrator Attitudes; *Administrator Role; Comparative Education; *Educational Change; Educational Legislation; Elementary Secondary Education; Foreign Countries; Longitudinal Studies; *Politics of Education; *Principals; *School Restructuring
IDENTIFIERS Education Reform Act 1988 (England); England; *Head Teachers; Wales

ABSTRACT

This paper uses the research findings of a longitudinal national study to examine the changing role of headteachers (principals) in England and Wales. The first section provides some basic information about the United Kingdom education system and a short historical perspective on the traditional role of the headteacher. Education in the United Kingdom is currently undergoing unprecedented change; legislation, particularly the Education Reform Act of 1988, is bringing about restructuring on a national scale. In the first part of the paper, these reforms are discussed and compared with reforms occurring in other countries. The second half of the paper is concerned with the headteachers' views on the changing situation, as well as with the changes that take place as new headteachers settle into the job. Over 80 percent of the headteachers interviewed as part of the national study maintained that their roles had changed considerably, that they were now much more concerned with responses to external initiatives, management and administration, public relations, and staff support. In addition, these headteachers indicated that the volume of work had increased significantly. (IAH)

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THE CHANGING ROLE OF HEADTEACHERS IN ENGLAND AND WALES

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American Educational Research Association

Chicago, April 1991

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The Changing Role of Headteachers in England and Wales

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This paper uses the research findings of a longitudinal national study to examine the changing role of headteachers. The first section provides some basic information about the UK education system. Then the traditional role of the head is given in a short historical perspective.

Education in the UK is currently undergoing unprecedented change. Legislation is bringing about restructuring on a national scale and details about the new context form a major part of the paper. These reforms are also briefly compared with those occurring in other countries.

The second half of the paper is concerned with the heads' views on the changing situation, as well as exploring the changes that take place as new heads settle into the job.

1. The UK Education System

In the UK there are about 25,600 primary and nursery schools for children aged 4 to 11, and 4,894 secondary schools for 11-18 years olds. In 1989 the pupil population was about 9 million and the total teaching force was about half a million.

In England and Wales national responsibility for education and policy making is undertaken by the Department of Education and Science (DES), staffed by civil servants with political control held by the Secretary of State. However, the day-to-day responsibility for education belongs to the 116 Local Education Authorities (LEAs) which are smaller than a US state but larger than the average district. The smallest have about 50 primary schools (equivalent to elementary schools), and 10 or 12 secondary (high) schools. The large LEAs have about 500-800 primary and 100 secondary schools. The average school size is roughly 200 children in primary and 800 students in secondary. Each LEA has a Chief Education Officer (equivalent to the superintendent) and a team of officers and inspectors (roughly equivalent to supervisors). Each inspector usually has responsibility for a curriculum area and a group of schools. They offer subject advice, help schools interview and select teachers, organize inservice training, and inspect the schools and classroom teaching to maintain standards.

Her Majesty's Inspectors of Schools (HMI) constitute a separate team of about 500 government inspectors who provide the 'eyes and ears' for the DES.

All secondary schools have a senior management team (SMT) consisting of the head, two or three deputy heads (assistant principals), and sometimes in large schools, another three or four senior teachers. Each member of the team teaches an average of about 50% of the week and has specific management responsibility for an area such as curriculum, staff development, administration, or oversight of the pastoral system. (Pastoral care is the equivalent of counselling in the US but is undertaken by most classroom teachers in their

dual role as subject specialist and form tutor to about 30 students.)

Primary schools have a headteacher, one deputy and a team of classroom teachers who all teach the full range of subjects to their class of about 30 children. Classes are usually mixed ability and mainly grouped by age, the teacher works throughout the week with the same class of children who stay with her for a least a year.

Every school has a group of governors, elected from the community, who have oversight of the school and to whom the head is accountable.

2. The Traditional Role of the Headteacher

George Baron (1975) described the traditional role of the head in the early part of the 20th century as the 'headmaster tradition' - most headteachers were men, apart from the heads of girls schools. This role was characterised as holding absolute power, the headmaster was the autocrat of autocrats and the fount of all school policymaking. The origins of autocratic headship lie in the early development of state schooling which used the 'public' school as a model. (It is important for US readers to realise that the term public school in England in fact means a private, fee paying school, the best known of which are Eton and Harrow). The headmaster was seen to embody a sense of pastoral mission, expressed by personal example and not deflected by external accountability, save for the annual genuflection in his speech day report to parents and pupils.

The stereotype headmaster is described by Baxter (1977):

> My old grammar school head was entirely predictable: bramble tweed suited and fusten gowned, he was a benevolent dictator, remote from the pupils, civil to the staff, likely to say 'no' to any request that moved a hair's breadth from the established procedure, caning a few boys most days, moral and judicious in his public utterances - somewhat feared and generally respected.

Hughes (1973) believes that a new model of headship began to emerge at the end of the 1930's, which he termed the 'leading professional'; though it did not gain prominance over the autocratic model until the 1960's. In the leading professional model, the head still decides school policy, but looks on teaching as the source of their infuence. Hughes sees it as characterised by openess to consultation with colleages, to external professional influences (for innovations in curriculum and teaching methods), and to the involvement in educational activities outside the school. The head leads by professional teaching expertise and educational knowledge.

In the early 1970's the leading professional model became increasingly modified so that it was one of both leading professional and 'chief executive', which Hughes termed the dual role model of secondary headship. The key elements of the chief executive role included: delegation to deputies and other staff, being seen around the school, visits to classrooms and the supervision of staff, and the control of staff appointments.

Five broad influences caused this change;

- Changes in pupil numbers and ability range through the move to comprehensive schools

- Changing expectations of parents and pupils
- Developments of new power bases such as teacher unions and curriculum pressure groups
- External demands for accountability
- An interest between running costs and school performance

This combination made running a secondary school a complex task of organisational management and meant that policy making could no longer be concentrated in the hands of one person.

Following the 1944 reorganization of education, most children took the 11+ exam at the end of their primary schooling to determine which type of secondary school they could go to. The grammar schools creamed off the students from the top 20% of the ability range, leaving the rest for the secondary modern schools. A move to establish non-selective all ability secondary comprehensive schools began in the 1960's, but did not gather pace until the late 1960's and 1970's. Simon (1990) gives the following figures to show the changes in English schools.

1960 4.7% of all pupils aged 11+ were in comprehensives

1965 8. 5%

1970 32%

1974 62%

1980 87%

1988 92%

The average comprehensive school was at least twice the size of the previous grammar or secondary modern school and the wide ability range of the students required both a more complex curriculum and pastoral system.

3. The Changing Context

The Education Reform Act (ERA) of 1988 was the most important piece of legislation since the 1944 Education Act. It altered the basic power structure of the education system by increasing the power of the Secretary of State for Education and restoring central influence over the curriculum; which had been surrendered between the wars. The new act also introduced limitations on the role of the LEAs, who were forced to give greater autonomy to schools and their governing bodies. Since 1944, education was supposed to be a national service, locally administered. ERA's increased central control to government and at the same time greater autonomy for schools (simultaneously 'loose-tight') was highly controversial.

Maclure (1990) believes two factors are important in understanding the underlying context of the legislation. The first was the teachers pay dispute which began in April 1984 and dragged

on over a period of three years. This took the form of industrial action with unions calling their members out at short notice. The dispute was only ended when a pay settlement and a new teachers contract was imposed by the Conservative government. Maclure argues that this substantially weakened the ability of the unions to resist the new legislation.

A second major factor was the polarisation between local politics and central government. A few left wing local councils had refused to cut expenditure in line with the government's demands and had incurred financial penalties in the form of rate capping. The Conservative government clearly wished to curb the powers of local authorities.

ERA has introduced massive changes on a national scale which considerable effect the role of the headteacher. In order to understand the new context in which heads have to work, it is necessary to provide some detail in the following sections about the legislation, together with more recent modifications and updates which are appearing almost weekly or monthly from the DES.

The National Curriculum

The National Curriculum, compulsory for all pupils aged 5-16, consists of three core subjects - maths, english and science, and seven foundation subjects - history, geography, technology, music, art, PE and at age 11, Modern Languages. Religious education was the only subject specified under the 1944 Act, and it is still required today.

Each subject will have specified knowledge, skills and understanding which pupils are expected to have learned at the end of each key stage:

Key stage 1 - age 7, KS 2 - 11, KS 3 - 14, KS 4 - 16

These form the attainment targets. Arrangements for national assessment was also specified. Therefore each subject has a programme of study, attainment targets and assessment arrangements.

Two bodies were set up to manage the new initiatives. The National Curriculum Council (NCC), and the School Examination and Assessment Council (SEAC). The Secretary of State nominates all the members of the councils.

Working Groups were established for each subject area. Maths, english and science were set up first and had to report by the summer of 1990. The other working groups followed in sequence. The procedure is that the proposals from the working group go to NCC and SEAC and the Secretary of State, and then out for consultation to LEAs, teacher associations etc. The councils consider the comments received, and then report back and advise the Secretary of State, who has to publish the report but does not have to accept the recommendations. In theory, the process is designed to constrain the central power of the Secretary of State through the consultative procedure, but clearly he retains the final say.

The new powers to prescribe the curriculum are similar in effect to those provided by the 1902 Act. This lasted until the 1944 Act which moved control of the curriculum to the LEAs. In practice this meant that the heads and senior staff had prime responsibility for deciding the curriculum. National exams at age 16 (the end of compulsory schooling) and 18 (for university entrance) exerted a strong influence on the secondary school curriculum. Other influences were the local LEA advisers and the HMI.

A previous Act in 1986 was mainly concerned with reforming the composition and role of the

school governors. However, it lead to confusion over responsibility for the curriculum - who had control, the DES, the LEA, the head or the governors? The desire for more central control of the curriculum was announced in the Conservative manifesto, published just prior to the general election of June 1987.

Having won that election, the necessary statutory instruments were laid before Parliament to bring the maths, english and science provisions into force by stages, beginning in September 1989. (Note that schools only had an outline of the National Curriculum, until the working groups reported the detailed elements of each subject.)

The national scheme of assessment aimed to give parents more information about their child's progress. A Task Group was set up to recommend a scheme of assessment and their report in December 1987 became the basis of DES policy. It proposed 10 levels to show progression from age 7 to 16. Thus Levels 1/2/3 applied to 7 year olds, with Level 2 representing the national average. Assessment was to be through a combination of national standardised tests and teacher assessment. However, in August 1989, SEAC announced that the teacher assessments were to be subordinate to the national tests.

The standard assessment tests (SATs) were piloted in schools during 1990. The results of these trials showed that considerable revision was required as they were too complex and took up too much teacher time. All 7 year olds will now be tested in english, maths and science at Key Stage 1, using a revised format, in 1991. In future it is planned to publish the aggregated test results for each school for 11, 14 and 16 year olds. This has not been welcomed by the profession, as it is seen to increase competition among schools for pupils, and the aggregated results will not be adjusted for SES.

Problems arose in trying to allocate time-table (schedule) time for the 10 NC subjects. It was originally suggested that 75-85% of the available time in secondary schools should be taken up with the NC, this was later changed to not less than 70% and finally, no specific amount of time was specified in the Act.

Further confusion was caused by the new Secretary of State's speech in February 1991, in which he said that Art and Music will now only be optional after the age of 14. In addition he said that a full course in Modern Languages was not required up to 16, but it could be delivered in shorter courses or as part of a vocational option. There was speculation that Kenneth Clarke had not discussed the decision with the NCC and secondary heads were furious as they said that two years of curriculum planning had been thrown out.

The monitoring of the implementation and enforcement of the NC is through the governors, LEA inspectors and HMI.

Governors

The Education Act (1986) and ERA (1988) changed the role and composition of the governors. Each school has to have its own governing body made up of parents, teachers, LEA personnel, community representatives and the head (unless he/she chooses not to). A secondary school with more than 600 pupils has 5 parents, 5 LEA staff, 2 teachers, 6 co-opted community members and the head.

The governors are now responsible for hiring and firing staff, the delegated school budget, and implementing the National Curriculum. They must produce an annual written report to parents and hold a parents meeting once a year.

Although LEAs are still the teachers employers, all appointments are now made by the governors. The Chief Education Officer must give the governors advice about the appointment of heads and deputies, but power of appointment rests with the governors.

A major task has been to provide training courses (government funded) for the hundreds of thousands of governors to help them deal with their new powers and responsibilities. It is important to remember that the majority of governors are lay people and that they are not paid for the considerable amount of work they have to do.

Open Enrolment

ERA established the rights of parents to send their children to the state secondary school of their choice, subject only to the physical limit of capacity of the buildings. Open enrolment was also promised in the conservative manifesto May 1987. A basic assumption of ERA is that competition among schools through open enrolment will act as a spur to quality. It will not be a totally free market, but it is clearly a step in that direction with the budget of a school being directly related to the number of students it can attract. The theory is that schools will have to sell themselves, and parents, as consumers, would be given both greater choice and influence.

In February 1990 the DES extended open enrolment to primary schools in an attempt to increase parent choice from September 1991.

Finance

Local Management of Schools (LMS) is clearly very similar to the US notion of school-based management. The 1988 Act forces LEAs to devolve money to individual schools. Initially, only secondary schools and large primaries (over 200 pupils) were to operate the scheme, but more recent decisions in 1991 now mean all schools will have delegated budgets. The control of the budget is through the head and governors. Each LEA had to work out a formula based on pupil numbers and the average salaries of teachers in the authority, and submit it for approval to the DES. A few authorities eg. Solihull and Cambridgeshire, had already begun similar schemes before ERA.

The DES provided funding, to install computers to handle the delegated budgets, and to allow each school five days training.

A secondary school would have a budget of about £1.5 million (3 million dollars per annum) and they have usually appointed bursars or senior administrators to control the budgets. In some cases, a deputy head has taken on this new role, and others have been fortunate to appoint retired bank managers. The biggest school in the country with 2000 students and 140 teachers has a budget of £3 million.

It is more problematic for primary schools with possibly a budget of about £100,000, they do not have sufficient funds under the per capita formula to appoint their own bursar and a concern is that the administrative load will fall on the headteacher.

LMS imposes considerable workloads on the governors and senior staff in schools and the initial anticipation of being able to control large budgets has proved to be a major disappointment for many heads, because the budget headings are tightly controlled, and mainly taken up by staff salaries, relatively little remains for flexible use.

An example of how the budget is distributed was given by the head of a secondary school

with 1,120 students aged 11-18. He has a total budget of £1.81 million. 82% is accounted for by staffing. The running costs of the premises takes 11%, capitation and examination costs are 5% and 1% is used for student and staff travel. This only leaves 1% or £18,358 for contingencies, which with some underspend means he has about £25,000 to distribute on other things. He could use it to enhance teachers salaries with extra payments, but as he points out this could be devisive and only a few staff would benefit. In fact, he says it will be spent on painting, decorating, carpets and some equipment, but it is still not enough to overcome the backlog of repairs.

The main problem with formula funding is that it produces some schools which are 'winners' and others that are 'losers'. The original DES circular in 1988 promised a formula based on schools objective needs, but the LEA schemes which began in April 1990 are all based on historic spending in that they are based largely on salary costs.

An example of a 'loser' is a secondary school with 850 students aged 11-16. The formula funding based on the average salary of teachers across the LEA, meant they were £36,000 down on a total budget of £1.25 million. Cushioning arrangements in the LEA limit the reduction to 0.5% of the budget so the school must save £6,000 per year. This would be possible if they could replace a senior teacher with a junior one.

Many people are concerned that cost may dominate over quality of teaching in selecting new staff.

Local Education Authorities

In April 1990 there were 116 LEAs in England and Wales, following the government's dissolution of the Labour controlled Inner London Education Authority, which served the whole of London and was one of the largest authorities in the world. Under a special section of ERA, 13 new London LEAs were established to cover the 1,000 schools previously administered by the ILEA.

Under LMS the LEAs are allowed to retain some monies centrally for services such as the local inspectors, and the educational psychologists. DES figures showed that in September 1990 the amount of money devolved to schools varied across the LEAs from 71-83%, with an average of 77%. In December 1990 the DES told LEAs that they had to devolve 85% of the budget to individual schools.

The most important role for the authorities is to monitor school performance. Accountability becomes a prime objective. For most people this means a major shift away from being an adviser to an inspector. Some LEAs have established two teams of inspectors and advisers (who schools will be able to buy in).

The enormous reforms have substantially changed the role of LEAs and a recent report was entitled, 'Local Education Authorities: Losing an Empire, Finding a Role.' There is even some speculation that they might cease to exist altogether in a few years time. A measure of the uncertainty is shown by the numbers of Chief Education Officers changing jobs which Esp (1989) claimed was 20% in 1988-89, which although there are no accurate figures, seems a much larger proportion than in previous years.

Grant Maintained Schools

A section of the Act, which has very important consequences, allowed schools to 'opt-out' of their LEA and become 'grant maintained' (GM) - or financed directly by central government. In state schools with over 300 pupils governors and heads can consider GM status and then must consult the parents through a postal ballot. More than half the eligible parents need to cast their vote and it is carried on a simple majority. If they vote in favour of opting out, the governors provide the Secretary of State with detailed proposals and he accepts or rejects them, following scrutiny of the schools by HMI.

This part of the Act received great hostility from all sections of the education establishment and it seemed as though few schools, apart from those threatened with closure, would seek GM status.

18 GM schools opened in September 1989, another 8 were approved and due to open in the next 12 months. Ballots had been held in 62 schools with three-quarters (47) voting in favour of opting out. The average number of parents voting was about 70% and by September 1989 the Secretary of State had only rejected 5 schools.

In October 1990, John MacGregor, the Secretary of State announced a new package and said that all schools would be allowed to seek GM status. (It was no secret that Mrs Thatcher, the Prime Minister and herself a Secretary of State for Education in the 1970's, had said most schools should opt out). The new package offered a massive increase in the incentives, which meant that a 1,000 pupil secondary school would get an initial transitional grant of £60,000 and a 50% increase in the previously announced annual amount of specific grant, together with a 50% increase on the present equipment grant of £16,000. In March 1991 it was announced that all GM schools would receive an extra 16% of their budget every year. This is supposed to compensate for the advisory and other services which were provided by the LEA. The increased incentive package and the fact that all schools are now eligible has meant that additional numbers of schools are considering the idea seriously.

In his October speech, MacGregor announced the go-ahead for the 50th school some 16 months after the legislation, and said that GM schools are the 'jewel in the crown of parent power'.

The majority of the 50 schools were either affected by closure or wished to maintain their selective grammar school status. The largest GM school has 2000 pupils, while the smallest has only 45.

One of the first to opt out was the London Oratory, a Roman Catholic school with 1,200 boys. In February 1991 the educational press reported that the salary of the head had been increased from just over £30,000 to about £50,000 (100,000 dollars per year). This meant that he was earning more than the highest paid head of an LEA school who currently received £40,000 (due to rise in December 1991 to £46,000). It seems that the heads of most GM schools have had an increase in salary, but none are reported as high as that given in the London Oratory school.

In the state sector three LEAs have already offered heads performance-related pay schemes, but it seems that most heads are reluctant to accept the idea.

It seems the numbers of GM schools could be around 100 by September 1991. This is of course, still a very small percentage of the 30,000 schools in England and Wales, but many heads who are philosophically opposed to the idea, now believe that in the interests of the school they cannot ignore the substantial financial incentives.

Teacher Appraisal

In the US a considerable amount of principal time is taken up with teacher evaluation, which in the UK is termed teacher appraisal. The systematic appraisal of teachers has not been common in the UK and therefore taken little of the head's time, although some have introduced regular annual interviews with staff.

In December 1990, Kenneth Clarke, the new Secretary of State, said that it would be compulsory for all the half million teachers in England and Wales to have their classroom performance appraised every two years. This reversed a decision of the previous Secretary of State, John MacGregor, who only three months earlier said it would be voluntary. The new DES scheme would not link pay or promotion to appraisal.

The National Steering Group (NSG) report which was published in 1989 and was based on considerable work in six LEA pilot schemes, said it would cost £42 million to implement the scheme properly. HMI had concluded that an extra 1,800 teachers would be needed to cover the release of teachers to be trained during school time.

Mr Clarke ignored both these recommendations and said, 'There may be a need for some training, but appraisal is not outside the ordinary duties of heads and senior teachers.' He said that £10 million per year for two years would be available to introduce and operate the scheme. LEAs will be responsible for supervising teacher appraisal and 50% of the teachers have to be appraised by July 1993 and the rest by 1995.

The appraisal cycle for teachers will take two years and be conducted by the head or senior teachers. Teachers will be observed teaching on two occasions followed by an appraisal interview and the preparation of a statement which includes agreed targets for the next year. The reports will be seen by the head, the Chief Education Officer of the LEA and designated inspectors. While the Chair of Governors would be given a full appraisal report on the head, they will only see details of the targets set during teachers' appraisal interviews, if they wish. The LEA are responsible for appointing two people to appraise the head of each school.

The teacher unions have given the scheme a mixed reaction. They were fully involved in the NSG and supported the recommendations produced. Their main concern is the lack of adequate funding for the DES scheme.

Problems arise in trying to fit in all the necessary training for both appraisers and appraisees with all the training already taking place for the many other initiatives.

4. Reform in Other Countries

The type of educational reform in the UK is similar to that occurring in other countries.

New Zealand has gone through substantial changes. In October 1989 the Department of Education ceased to have day-to-day responsibility for schools and this was taken over by individual school boards for each school (similar to the UK governors), who hire teachers and principals and decide how nationally provided funds are spent. National curricula and testing were maintained and strengthened.

Changes are planned for the organization of Australian state education and some of the Canadian districts, such as Edmonton have been using school-based budgeting for a number of years. However, Holdaway (1991) points out these schools are still very much part

of the local school district, in contrast to the UK schools where he considers they have become essentially self-governing under LMS.

Reform in the US has occurred at both state and district levels. David (1989) concluded that 'school-based management is becoming the centrepiece of the current wave of reform' and she cited developments in Florida, Maryland, Louisiana and New Mexico.

US reform is generally seen to have occurred in three waves: the First Wave focused on student performance and teacher quality and is exemplified by publication of 'A Nation at Risk' (1983). The Second Wave concentrated on the preparation of teachers: eg the Holmes Group's, 'Tomorrows Teachers' (1986) and the Carnegie Forum's, 'A Nation Prepared' (1986). The Third Wave examines administrators preparation eg. 'Leaders For America's Schools' (1987), the report of the National Commission on Excellence in Educational Administration.

Murphy (1989) looking at the US reforms in the 1980's says, 'The number of reform initiatives is overwhelming. States have selected different strategies to implement similar reforms.' Trying to sort out the effects is problematic, but Murphy believes many of the reforms, especially those of the First Wave, have been successfully implemented on a widespread basis and are having an important influence on the schooling process.

The national reforms in the UK fit the label of 'restructuring' used as a broad umbrella term in the US. Murphy and Evertson (1991) identify four main strategies in the approaches to restructuring: teacher empowerment, teaching for understanding, choice, and school based management. Most efforts have used one or two strategies. At the onset of the restructuring movement, teacher empowerment held centre stage. More recently, attention has shifted to school-based management and choice. Restructing is changing the relationship between the school and its environment. A major change in restructuring efforts is the incursion of a market philosophy into education and the business of schooling is being redefined in relation to the customer. There are important changes in the hierarchical organisation of schooling and its governace with a move to decentralisation.

Guthrie et al (1990), using a comparative approach, consider that educational reform has been stimulated by the international nature of national economic problems and the concern that failure to have an educational system that provides a highly educated and adaptable workforce will lead to economic decline and a lower living standard. They conclude that a 'similar model of modern public education is emerging' in the UK, the US and other industrialised nations which has the following general features:

- a national curriculum, with more weight given to maths, science and foreign languages
- devolution to schools of operational decision-making authority
- greater use of performance tests for accountability
- an emphasis of teacher training and professionalism
- expansion of access and life-long learning incentives for higher education programmes

5. The NFER Research on New Secondary Heads

This section uses information from a national study to examine the changes in role as a new head progresses through their headship. It is also possible to use some of the data to compare the role of the new head to that of the previous head and see to what extent it has changed. This part of the research was conducted before the legislative reforms mentioned above, and at a time when heads had considerable autonomy and were able to introduce internal changes based on their own ideas.

The first major study of new principals or headteachers was carried out in the UK by the National Foundation for Educational Research (NFER). The three year full time project worked with the complete 1982/83 cohort of 250 people who became heads in secondary schools throughout England and Wales. After lengthy interviews with a stratified sample of 47 heads soon after they took up post, 16 were chosen as case studies and followed over their first two years in office. The case studies were all co-educational schools, taking a full ability range of students, and situated in 16 different LEAs including rural, urban and suburban. Three one-week field visits were made to each of the 16 schools and interviews conducted with all the deputy heads, the chair of governors, a senior LEA inspector, and a cross-section of teachers. (A total of over 300 interviews). The heads were interviewed on each visit and documentary analysis and observation of meetings were also made at all the sites. After completing the 16 two-year case studies, a detailed questionnaire was sent to the cohort of new heads and returns were received from 188 (81% response rate).

The full results of the research have been published in the book, 'Secondary Headship: the First Years', by Dick Weindling and Peter Earley (1987). A US study, similar in methodology to that of the NFER project, has been carried out and the results appear in a forthcoming 1991 book, 'Becoming a Principal: The Challenges of Beginning Leadership'. Gene Hall and Forrest Parkay (Eds).

The following sections use some of the NFER survey data and draw heavily on the case study material to provide a picture of the new and old heads as a means of examining the changing roles.

The previous heads

In the case study schools 13 of the 16 previous heads had retired, five due to ill-health. Only three of the heads had moved to take up a second headship after staying at the schools between 3-7 years. Most of those coming to the end of their careers had spent over twenty years as head at the same school. We are thus looking at the headteacher of the 1960's and 1970's when we study these previous heads.

During the interviews with teachers in each of the 16 schools they were asked about the similarities and differences between the previous head and the new head. In most cases, marked differences were seen between the heads: 'They were as different as chalk and cheese'.

The 16 previous heads were all men (two of the new case study heads were woman). An analysis of the teachers views and opinions suggested that overall, four of the previous heads were seen positively, four negatively and views were mixed in the remaining eight schools. In nine of the 13 schools where the old heads had come to the end of their careers, teachers felt they were 'winding down and coasting to retirement'. These heads, according to the teachers who were interviewed, had become rather laissez-faire and were letting things slide.

Most of the previous heads had delegated a considerable amount to the senior staff and only four were seen as autocratic in their decision-making and failing to consult the faculty on major issues. Five of the previous heads were referred to as 'indecisive' in their decision-making and only two of the 16 were seen to make firm decisions. Just under half were thought of as people who did 'not want to rock the boat' and who tended to compromise or just 'sit on the fence'.

The pen-portraits from the teachers suggested that many of the heads conformed to the rather stereotyped image of the traditional English headmaster outlined earlier. In fact, many had continued to wear black gowns and adopt a very formal approach. Half the heads were referred to as 'perfect gentlemen'. But a negative point made against seven of the heads was their general patronising and paternalistic attitude to the staff, and particularly the women and junior teachers. Five of the heads were felt to be very bad at public relations, they shunned publicity and wanted little to do with the local community.

Only one of the heads was described as 'extravert, dynamic and charismatic' and he moved to his second headship after seven years at the school. Teachers spoke highly of him; he was very popular and when he left 'a dozen or so staff literally cried.' A senior member of staff at this school felt there were three types of heads:

> Those who like to be at the middle of the circle, like our previous head; those at the top of the pyramid; and the mushroom types, who keep you in the dark and hurl manure at you!

Teachers in ten of the 16 schools said their previous head had found it very difficult to cope with comprehensivization in the 1970s when the schools were reorganized from either grammar or secondary modern schools.

The previous heads had not worked in comprehensive schools and found the change from a small grammar or secondary modern school to a larger institution with a much wider student ability range, a very difficult transition to make.

A number of teachers mentioned the physical appearance and personal characteristics of the previous heads and these clearly influenced their perceptions. 'He didn't look like a head and people thought he was the school caretaker (janitor)'. Another head was described as, 'a very lonely man and almost grateful if he was drawn into a joke. We were unfair to him in many ways. He was a bit odd to look at and had some quirky ideas, for example, he was a nudist and lots of stories went round about him.'

The New Heads

The national survey showed that in the UK the 'average' new secondary school head was a man aged 42 who had taught for 20 years, gaining promotion from classroom teacher to head of department and then to deputy head (assistant-principal) before becoming head. Only 13% of the cohort were women and two-thirds of these were heads of girls schools. The very low number of women heads was a cause for concern and seemed to be linked both to the lower number of women applicants as well as some bias in favour of male candidates by the selectors from the local community. More recently some of the LEAs have begun to increase their recruitment of women heads.

An important difference between the UK the US is that no certification is needed to become a headteacher in Britain. Preparation is through experiential learning and attendance at

various short courses provided by Universities or the LEAs themselves. The heads said that they had learned different aspects of headship from each of their previous levels of teaching, but most of the management skills and knowledge were acquired during the six years which the average person spent as a deputy headteacher. While deputies gained first-hand knowledge from their specific area of responsibility, being a member of the senior management team also allowed people to share in decision-making related to all aspects of school management. It would seem that this on-the-job learning is a better preparation for headship that the US system of internships.

Only 10% of the cohort was appointed internally from deputy to head in the same school. Unlike the US where people are appointed within the district or state, most people (60%) had changed LEAs to take up their first headship. With no certification, jobs are advertised nationally in the education press and anyone with the relevant experience can apply. Another major difference from the US is that only 2% of the new heads had worked previously in the UK equivalent of the district office, all their careers were spent in schools.

The questionnaire returns showed that most of the new heads were able to meet the outgoing head during the visits made in the 'head designate period' - the time between appointment and taking up post. The majority found the information obtained from the previous head was very useful in providing background data on the faculty, history, organization and ethos of the school. One new head described his situation:

> The meeting was very useful, particularly when I spent an evening with the retiring head at his home. He had prepared a list of issues and areas which he felt needed attention and had been neglected because of his illness and the possibility of early retirement on health grounds. This discussion helped to clarify in my mind what needed to be done, and indeed the priorities. Perhaps most usefully it made it very clear that things would be expected and accepted from the very start, whereas, my intention had been to wait and see a little.

For a small number of heads the discussions with the previous head proved to be of little use. The main reason given was the very different educational philosophies between the new and old heads. the meetings produced a mixture of information and option and for at least one head, 'the information was invaluable, the opinion/prejudice far less so.'

'The Shadow of Principals Past'

Considerable numbers of new heads in the survey felt that the practice and style of their predecessor had caused serious difficulties during their early years of headship. Clearly, stepping into someone else's shoes can often be a problem and Gordon and Rosen's (1981) review of the leader succession literature concluded that: 'the personality and style of a predecessor can create lasting effects making change by a successor difficult to achieve'. They believe it is necessary to consider whether, 'the former leader is a hero to be lived up to, or a bad act which is easy to follow. . . The popular predecessor who was all things to all people can make any successor's job extremely difficult'.

But the NFER study shows that this is not always the case. In the case study school mentioned early, where staff had cried when the very popular predecessor had left, the new head was well received by the staff, who all spoke highly of him in their interviews.

Gordon and Rosen provide evidence that the frequency of succession is an important factor: 'too many managerial replacements in too brief a period can be disruptive.' This was borne out by an analysis of the 16 case studies, which showed that two of the schools had four previous heads in the last 10–15 years, three had two previous heads and 11 had only one change. The staff in the first two schools were unhappy with the large number of changes and were clearly unsettled.

The lasting effect of the previous head was described by one of the new heads, who said:

> One of the biggest problems for a new head is not what you do or do not do, but rather something which is out of your hands, namely what sort of relationship existed between your predecessor and the staff. It's annoying because there is nothing that you can do about it.

Some of the heads seemed to ignore the recent history and assume that they were starting with a clean slate – this was a fundamental error, as one of the major influences on how well they were able to introduce change was the organizational culture of the school. One of the case study heads tried to discover as much as possible about the way the previous head worked and then to introduce changes carefully to enable a gradual transition between his style and that of his predecessor.

The 'shadow of principals past' has a major influence on the school's culture and it probably takes something like three to five years before the new heads influence has much effect on the ethos of the secondary school. It may be possible for a new primary head to influence her school more quickly than the secondary head, as she has more direct contact with the smaller number of staff.

Interesting new work on school culture and leadership is now beginning to appear: see for example, Deal and Peterson (1991) in the US and Nias et al (1989) in England.

Headship Style

To obtain perceptions of style the cohort of new heads were asked in their questionnaire, 'From what you know and have heard of the previous head, how would say your style compares with that of your predecessor?' The replies showed considerable agreement with the new heads believing themselves to be more consultative and involving more staff in decision-making. They thought they delegated more to their senior management teams; were more accessible and open to other people's ideas; used a more personal approach to both faculty and students and established closer links with the community and district office.

During the interviews with the 47 new heads, they were asked to describe how they worked as a head. The most common response was to say they operated an 'open door' policy for staff, students and parents. They literally tried to keep their office door open most of the time. One head contrasted his open approach with that of his predecessor by saying that when he arrived he was horrified to find that there was no bulb in the 'Enter' sign outside his office! This produced a fantasy of an endless queue of people waiting hopelessly outside the head's door. The majority of new heads practised MBWA – Management By Wandering About – and talked of getting around the school as much as possible and not being 'office-bound'. They felt it was important to be seen in the corridors at recess, to observe lessons and take assemblies. Most took paperwork home in order to be free in the day to

go round the school and be available for staff, students and parents.

Another theme mentioned by most heads was the need to spend a lot of time listening to staff and getting to know their interests and problems. It was important to talk to groups and individuals and listen to their points of view. The stress throughout was on face-to-face relationships and a few heads even refused to accept memos from staff, saying that they preferred teachers to come and see them.

Almost all the new heads wanted a participatory style of management and said they tried to involve as many of the staff as possible in consultation. But they recognised that a truly democratic approach was not feasible and made it clear that while they would discuss and listen to staff's views, they retained the right to make the final decisions as 'the buck stopped here'.

A small number of the 47 heads described themselves with phrases such as: 'a cunning, jovial dictator', 'a benevolent despot' and 'a bit Machiavellian at times'. The others stressed honesty and integrity and most felt it was very important to 'lead from the front' and to be 'prepared to take your coat off and get on with it'. Heads needed to have a 'bird's eye' view of the whole school and also be seen to be highly involved, sympathetic and supportive to staff and students.

The amount of informality and degree of social distance from the faculty varied among the 47 heads. Some wanted to be called by their first name and liked to spend their coffee breaks in the staffroom, talking informally. Others wanted to preserve a social distance from the staff and rarely went into the staffroom. Which of these alternatives they stressed seemed to be largely determined by the personality of the individual, but establishing the 'correct' amount of distance from the staff was of concern to most new heads.

On our second visit, the case study heads were asked if they thought their style had changed over the first year. Two of the heads were aware of a definite change in their approach. One who had used a very autocratic style to introduce rapid change and now felt he could 'relax the hard leadership line and move step by step'. Another head said he had become more Machiavellian and scheming because he felt that his ideas for innovation were being blocked by the elderly and traditional senior team (the three deputies had spent a total of over 100 years at the school). Three heads said they had become harder and tougher over the year. They found they had to tell some teachers off and learn to say 'no' to staff. On occasions they had to be more authoritarian and directive than they had been originally and sometimes say, 'I am sorry, but this will happen'. The majority said their style had not really changed over the year, but they felt more relaxed and confident. In reply to a separate question, most of the case study heads did not believe there was a significant difference between how they would like to operate and how they, in fact, worked. Four heads found they were not able to be as open and democratic as they wanted to be because of some of the staff they had inherited.

On both the second and third visits, each of the case study heads was asked if they felt the job was getting easier or more difficult. Almost all said it was getting easier, although factors such declining student enrolment, low teacher morale and LEA financial restraints counteracted this to some extent. After a year in post, the heads were becoming more confident as they had now been through the whole cycle once. It took time to get to know the teachers and for the faculty to get to know the new head. Generally, this meant relationships became easier, but it also meant the heads became aware of the teachers'

shortcomings, and vice versa. For a few of the heads, matters had become easier with the appointment of a new deputy, releasing the heads from some of the tasks they had previously undertaken. Generally the heads became more relaxed with time and the pace was less hectic. One head after a year in post said, 'Last week was the first time that I was able to say "what shall I do first?" Before this, there was no question of choice!' Although the volume of work remained high, the heads had become more confident and were beginning to delegate and pace themselves better towards the end of their second year.

Teachers Views of the New Heads

Despite the new heads intentions to be consultative, most of the 250 teachers who were interviewed did not think the heads were very open to other people's ideas and opinions. Only one of the 16 heads was perceived as being genuinely open, and two were believed to either ignore or not to listen to staff at all. The other heads were seen as open and willing to listen but unlikely to change their minds on key issues. Teachers generally thought the heads knew what they wanted, were quite determined or even stubborn, and were only prepared to modify their views slightly. Most teachers wanted the heads to consult and listen to the views of staff on major issues, but then to make a clear decision. They disliked indecisiveness and slow decision-making. New heads are often placed in the difficult position of having to make decisions without having all the necessary information. One head was criticised for 'too many get-backs', as he frequently said to staff, 'I'll get back to you on that.' If heads required some time to make a decision, it was important not to forget to 'get back' to the teachers concerned.

Teachers welcomed the 'open door' approach adopted by most of the heads but, in one case, staff found it difficult to see the head because of the constant queue of students waiting outside his door. From the first week he had made it clear that students could go directly to him and they did so. Several teachers thought the plan had 'backfired' because students saw the head as an 'easy touch' - he was too lenient on them and had lost the respect which the teachers believed heads needed.

Most staff liked the heads to be seen around the school in the corridors and playgrounds. They also wanted heads to visit more classrooms, something which many of the heads had done at the beginning but found little time to do later. The degree of informality and the correct distance from staff and students was something teachers did not agree on. Most welcomed an informal, relaxed style with staff but felt that a certain distance was required with the students to maintain their respect for the head. The majority of teachers who were interviewed, liked the head to come into the staffroom and to join in various social events. However, the correct balance was difficult and some heads were criticised for being 'too chatty and matey' with the staff. In another school a teacher complained that the head was not prepared to join the cricket team or accompany the staff for a drink. They had tried to be polite and sociable but, much to their annoyance, they felt he had spurned them.

All the new heads were seen as very hard working by the staff. But this in itself was not enough; teachers wanted strong leadership and while many of the heads were able to provide this, in some schools the staff were not impressed. 'He is pleasant and never makes waves, he works hard, but I don't feel there is anything that 5,000 other people couldn't do - there is no dynamism.' In another school a teacher said, 'The head should be on the bridge as captain of the ship. But where is our head? Down in the stores, trying to sort things out!'

Heads must take considerable care not to show favouritism to particular groups of staff or individuals. A number of teachers made critical comments about some of the heads who they felt had given preferential treatment to certain departments, individuals or younger staff. In most cases it seemed the heads were unaware that their actions had upset some staff.

A source of annoyance for many teachers was the tendency for a new head to constantly praise what had happened at their previous school. This was often interpreted as criticism of the present school, whether intended or not, and irritated the staff. New heads must acknowledge the school's good points as well as suggesting areas for change and must not assume that because something worked well in one school it can be transferred wholesale to the new situation.

Although much of this section has dealt with the adverse reactions of teachers it should be noted that in most of the case study schools the overall teacher reaction to the new heads was positive or very positive. In only four of the 16 schools could the general reaction be described as mostly negative. Many teachers made very favourable comments concerning the heads' first two years in post and spoke in terms of the school and faculty having gained a new sense of direction, a purpose, a feeling of teamwork and of being a much more cohesive unit than was the case before the head arrived.

Expectations and Realities – Can You Walk on Water?

The arrival of a new head can be both an exciting and difficult time for the faculty and the new heads themselves. It is often a time of apprehension and fear of the unknown with high expectations being held by both parties. In all 16 case study schools, teachers said that the initial reaction from the faculty had been very welcoming and responsive. This was true even for schools with a history of poor relations between heads and teachers. There was an air of expectancy and many staff were excited and optimistic, looking to the head for a fresh start and knowing the new head would want to introduce changes. Some heads found they had 'a hard act to follow', but were nevertheless given a sincere welcome. Others were seen as the school's new champion or saviour. In fact, the number of biblical references was noticeable, with comments being made about the staff wanting a 'second coming' or 'a Moses figure to lead them out of the wilderness'. Some heads felt the expectations staff held for them were so great they were expected to be super-human. One head said,

> I think the staff here had unrealistic expectations of me and wanted someone who could "walk on water". We are all mortal and there was no magic solution. I had to disabuse them of this early on.

Although the new heads were 'welcomed with open arms on arrival' by the vast majority of the teachers, and there was an initial fund of goodwill, this had often been dissapated at a later stage. In seven of the schools a large number of teachers felt their initial expectations had been too high, and in retrospect, unrealistic. It had proved impossible to please all the people and some teachers felt disappointed by the end of the second year that the new heads had not been able to match what they said they would do.

The new head has to portray a long-term vision for the school as well as establish some short term objectives and show they can achieve them. An example of the later which proved popular with staff was to get the school redecorated or to obtain other physical improvements to the plant to improve the working conditions for staff. The head has to maintain a balance between plans which are long-term and difficult to achieve, yet act as a

motivating and uniting force for the school and other smaller scale objectives which can be achieved fairly easily.

Most of the case study heads felt they had been given a 'honeymoon period' when the staff were more receptive and less critical. However, the length of this varied considerably and often seemed to be ended by a specific incident. New heads should assume that they will be given a honeymoon period, which could last from a few months to a year, and decide how best to use this time, eg. by establishing the groundwork for major changes.

6. Secondary Headship Five Years On

All the previous information was obtained from a study of the first two years of secondary headship. The research team at the NFER were aware that a longer period was needed to see the changes introduced by the new heads take effect, and a smaller scale follow-up study of the cohort of heads was planned. Although sufficient funds were not available to replicate the methodology of the earlier study, it did prove possible for each of the case study schools to be revisited and for lengthy interviews to be undertaken with the 16 'new' heads. The interviews explored a variety of issues including the changing nature of headship, headteacher support and professional development, relations with staff, difficulties encountered and the change process. The interview data were augmented by information derived from a second questionnaire survey of the 188 heads who had contributed to the earlier research. The questionnaire, which explored similar issues to those raised during the interviews, was dispatched in the summer of 1988 and, by the autumn, 123 replies had been received (a response rate of 65 per cent).

The results of the follow up study have been published as, 'Keeping The Raft Afloat', by Earley, Baker and Weindling (1990).

The first point to note was that 82% of the 1982 cohort were still in the same post, some five to six years later. 11% had moved to take up a second headship, 3% had taken other posts such as LEA inspectors, and 3% had retired.

To what extent had the role changed?

The longitudinal study allowed us to explore the various ways in which the role of heads had changed since their appointment in 1982-3. The survey showed that over 80 per cent of heads maintained that their role was now very different from when they took up their post five or six years ago. Four main changes were mentioned and these were:

- responding to LEA and Government initiatives
- becoming managers/executives/administrators
- dealing with public relations and promoting the school's image
- supporting and 'protecting' staff

The importance of external initiatives in the lives of heads may not seem too surprising, given the record of the last few years. It is, however, worth reminding ourselves of the context in which these initiatives had to be considered. For heads appointed in 1982-83 it

soon became clear that 'industrial action' was a fact of life and had to be managed - strikes, disputes, no 'cover', no meetings and children being sent home were the norm. Industrial action, according to some heads, had 'stunted the growth of the school', 'frozen any progress', 'soured relationships' and been 'a wearisome nuisance'. In the words of one head: 'It had meant treading water for almost two years and had introduced a sense of system maintenance instead of active development.' Another stated that industrial action had severely limited his ability to make changes at a crucial stage in his headship, whilst a third claimed that the dispute had overshadowed everything for much of the first five years of her headship and there had been 'a great cost in lost opportunities'. For heads personally, it was often a period of stress, frustration, exhaustion and isolation. One head even blamed the break-up of his marriage on the industrial dispute and others spoke of their health being badly affected and, in one case, of suffering the accusation of being a 'strike-breaking scab'. Fortunately, the majority of heads survived and at the end of it all could be described as 'bloodied but unbowed'.

Against this background heads were being asked to cope with a plethora of innovations from ERA. The National Curriculum, testing, teacher appraisal, new governing bodies with increased powers, local management of schools, possible opting-out and other changes, were the concerns that warranted urgent consideration. When referring to these initiatives and developments, heads commonly used such terms as 'imposition', 'demand' or 'obligation'. Many felt that the 'management of enforced change' was taking away from them the time and the freedom to develop purely school-based initiatives.

Views regarding the change of role that will come with local management of schools (LMS) were mixed. Some heads welcomed the prospect and one said:

> I feel the greater flexibility which this will give to governors and heads will be an advantage. On the financial side alone, I feel the school could be run more economically.

But many heads felt they would not enjoy LMS and that it would greatly increase their workload.

Similar points were raised in another piece of research undertaken by the NFER on behalf of the NAHT (National Association of Head Teachers. Earley and Baker 1989). Replies from a survey of 241 secondary heads found that 26% were unreservedly in favour of LMS, and a further 58% welcomed it partially. One head remarked:

> I'm looking forward to having more control over staffing and resources. I will be able to have remedial help evenly spread through the year - not having some terms without. The main use we make of our money will be to our benefit, not the authority's.

Another head supported this view and added: 'It will put financial decisions closer to the grass roots.'

Those heads who were concerned about LMS expressed their fears about a possible budget deficit, the inadequacy of funding, or the unfair distribution of resources. A substantial worry was about the amount of time LMS would occupy, and the kind of duties a head would be asked to perform. As one head explained: 'I believe my role is that of headteacher not lettings clerk or building maintenance officer.' Some heads who did not welcome LMS at all

wanted to know what was so wrong with the present system. A head totally against the introduction of local management declared:

> I see myself as the managing director of a small company. If I were in the business world I would have a financial director, a marketing director, a personnel director, etc. I shall have none of these but, instead, a group of supportive amateurs in the form of governors, most of whom have full-time work in other fields - not education. I can see no advantages whatsoever.

Although 60% of the 316 primary heads in the survey welcomed LMS, the remaining 40% did not. This is a much high proportion than that of the secondary heads (15%). This is most likely explained by the fact that the primary heads do not really have anyone to whom they can delegate administrative tasks. The single deputy head usually has a full-time teaching commitment and many heads try to continue to teach. As one of the primary heads said:

> In my school (I teach nearly 50% of the week) who is going to administer LMS? If, as seems necessary, I do, what happens to other duties? I work 14 hours a day and much of the weekends. Can I increase this?

The heads of very small primary schools faced even greater difficulties. The head of a village school in Wales with 35 children and one teacher in addition to himself, explained that his school still had the same requirements as a large one to implement the National Curriculum and LMS. He gave details of some of the practical realities he faced. The caretaker lit the coke boiler in the morning but as she lived a few miles up the road, the head had to attend the boiler during the day. When sheep got into the playground he had to chase them out and then sweep up their droppings!

A major problem, expressed by many heads, both primary and secondary, was that they did not, at present, possess the necessary skills to carry out their new function and they feared that they would not receive adequate training and support.

The initiatives from national and local government were responsible for a great deal of the paper arriving on the heads' desks, but the assumption of a more administrative role for the head - the second biggest change according to the NFER follow-up study and mentioned by about 40 per cent of respondents - has been a gradual process over the last few years. One head commented: 'The amount of paperwork to file, sort, redirect, delegate and organise from the LEA and the DES has increased tenfold.' Heads felt they were being required to do 'routine administrative tasks which could and should be done by a bursar'. These 'chores', they argued, took them away from the classroom and personal contact with the staff. They regretted the move away from being 'the leading professional' to being more of a 'chief executive'.

Accountability, with its need for careful recording, documentation and communication, had also added to the paperwork of heads. This included communication to parents who, it was remarked, had been made more aware of their rights and felt entitled to an explanation or even a justification of decisions made by the school. Also noted was the increasing amount of time that heads were required to spend with parents, partly because parents had become more difficult to deal with, and partly because many more now needed advice and counselling.

Accountability was also being faced in relation to the new governing bodies. It was apparent that heads were involved in a massive increase in the work with the governors. Heads were being required not only to prepare for and attend meetings, but also to service committees, summarise and distribute curricular documents and disseminate governor information to parents.

IAn increasingly important dimension of management - mentioned in the follow-up study by about one in every eight of the heads - was to do with public relations and the promotion of the school's image. Heads now realised more than ever the importance of marketing the school. With the competition that ERA encouraged and the problem of falling rolls, heads were having to look much more carefully at the school's reputation, its publicity, its relations with the community and its involvement with industry. This is sometimes called 'boundary management', where the head's task is to ensure that the school was open to contact with the outside world and that there was a ready exchange between the school and the local community. 'Boundary' management also involved the head in many more commitments outside the school. Such absences were compounded by the numerous meetings, conferences and training sessions that heads were required to attend. The NAHT survey, for example, revealed that there were heads who were regularly out of school for two or three days a week. This was a significant change of role for heads.

The other main change that was mentioned, albeit by only about one in 14 of the NFER cohort, focused on the increasing emphasis that heads saw themselves giving to their role as 'protector' of the staff. Of course, heads have always had an important pastoral and counselling role to play but their responses suggest that some are now increasingly needing to act as a 'buffer' against the onslaught of changes coming at the school from outside. One head claimed: 'Probably the most major shift in my role is an even greater emphasis on "protecting" the school from national and county initiatives'; whilst another saw himself as: 'guiding light, arbitrator, adviser, encourager, confidence-builder, protector and believer'.

Many heads viewed maintaining morale, showing concern for staff under stress and relieving some of the strain as a first priority. One respondent remarked:

> Headteachers are not the only ones under pressure...we need to have a lot more understanding about the personal pressures on staff. Instead of telling them they are behind with this or that, we can still require efficiency but be understanding, praising them a lot more.

Does the job become easier?

Results from the first research project indicated that during the first two years in post almost all of the case study heads said that their job was getting easier, although factors such as falling rolls, low teacher morale and financial constraints counteracted this to some extent. After a year in post, the heads were becoming more confident as they had been through the whole cycle once. But what about after five years or more in post? What do they think of the job, is it easier or more difficult?

Time and experience had obviously given the heads even greater confidence, their skills and awareness had improved and they had learned from their mistakes. Staff were much more ready to accept heads whom they knew and trusted and this had made for better relations and greater unity. 'We can see together what we've achieved,' said one head, whilst another explained: 'We needed time to adjust and to get to know one another.' An important factor

in this process of greater understanding and mutual trust seemed to be the change that many heads reported in their leadership style. Approximately two-thirds of the cohort believed they had become more consultative, more open and more democratic. Heads spoke of becoming increasingly aware of the need for more participative management and for staff ownership of change. 'Delegation' featured prominently in the heads' responses. For some, delegation was a new approach but for many it was more a question of improving and increasing delegation.

These changes in style had, in the heads' view, contributed to the job becoming easier. The heads saw themselves as more relaxed and calmer: in the words of one head: 'more distant emotionally, but closer to staff and pupils socially'. This closeness had been helped by less 'paper' communication and more informal verbal exchange. One head had come to the conclusion that he even talked too much: 'Now I talk less - listen and think more.' In all, the job had been made easier by a greater sharing of responsibilities. As one respondent remarked: 'The figure-head, traditional image of the headteacher, is now neither possible nor desirable.' Some commented on the fact that the job was easier because they now knew the LEA system and who to contact in the Education Office. Such a comment might well pose the question as to why these heads had not received a full induction into the LEA, its system and to the post generally, on their appointment. This whole area of preparation for headship is a thorny issue, perhaps best summed up by the head who asserted:

> It is quite frightening that, after a slender interview with a few banal questions, on the slender basis of that, you are let loose, with no induction to look after a budget of several million pounds. They say: there's your school, get on with it!

Not only were some heads pitched into the job without any preliminary induction but several had not even been allowed by the previous headteacher to go into the school before taking up the post.

Another factor in making the job easier was the opportunity for heads to appoint new members of the senior management team, who were broadly in sympathy with their philosophy, who could share their problems and to whom they could delegate some of their responsibilities. The earlier NFER study showed that, unlike many of their predecessors, heads of this generation believed in power-sharing and team-building. Also, although there were deputies who had made an easy transition from one head to another, there were a number with whom the new head found it difficult to work. Difficulties had come not only from uncooperative deputies but also from other intransigent staff. Change always brings a measure of uncertainty and a shift in the power structure, making some staff feel threatened by the possibility of failure to match up to new demands, or of the loss of status within the school.

The picture now, in the main, was that heads had been able to appoint new, and often younger members of staff who were bringing in new ideas and who had been able to provide a 'breath of fresh air'. The process of these appointments, however, had sometimes been traumatic for heads. In some areas, particularly in metropolitan boroughs, appointments procedures had been made more complex by the exigencies of LEA policies. Several heads related how a great deal of their time had been taken up with job descriptions, person specifications, the approval of long lists by race and gender units, and selection interviewing. Internal upgradings could cause bitter feelings, with the head often in a 'no win'

situation. In some cases the heads felt that they had not been fully supported by their governing bodies.

There was no doubt, however, according to the majority of the case study heads, that the job overall had greatly increased in complexity, to the point where, as one said: 'Some heads were in danger of sinking under pressure.' Despite increased confidence, better staff relationships, closer teamwork, new appointments and the rewards accruing from the successful implementation of change, heads found themselves swamped by the 'welter of initiatives' and 'traumatic changes - rapid and numerous'.

Industrial action, for most heads, was behind them but they were still repairing the damage to their schools and the breakdown in parental trust. Heads had been bruised by the dispute. One interviewee remarked:

> I could never reconcile myself to the effects of industrial action. It was damaging schools so badly. I felt it affected my esteem as a head.

Perhaps it was the after-effects of industrial action which made it more difficult for heads to cope with all the new demands from central and local government. As one remarked: 'It is impossible to say the job has got easier. As fast as one sorts out one thing another arrives.' Heads deeply regretted that the increased amount of paperwork had made them more office-bound. As one head pointed out:

> If you are actually giving attention to things in the office, you're not out there walking the school. But you can't abandon the desk or you'll be in serious trouble. In school, I'm responding to LEA or government initiatives. . . . I do reading at home - unfortunately always about education.

Regardless of whether the heads believed the job was easier or not, they certainly agreed it was different. They were very aware that with so many new initiatives their job would possibly never be the same again. A head remarked of the future:

> One is going to have to change. I suspect in five or ten years' time, heads may well not come at all from the teaching force. It is not sheer chance we are called headteachers, but there are aspects of local management that will mean that certain background aspects of headteachers will be seen as irrelevant. If we're going to be senior executives, we're going to be less and less involved with children in the classroom and much more with the organisational function. I'm glad I'm a head now. I don't think I shall find the new role very interesting. It's a cross between a bank manager and a personnel manager.

Should heads teach?

A major difference between the UK and the US is that unlike principals, most head continue to teach in the classroom. This has always been an important aspect of their leading professional role.

Information was obtained from the survey on heads' teaching commitments and, as can be seen from the following table, the majority (69 per cent) had a regular teaching commitment

whilst also providing cover (substitution) for absent colleagues. At present only a very small number (three per cent) said they did no teaching at all, although many noted how they had been compelled to reduce their teaching load drastically and with LMS and appraisal approaching, few thought they would be able to continue with a regular commitment in the classroom. For some, teaching had already become a thing of the past, particularly if it involved a regular commitment and especially if it was a public examination class. A case study head commented:

> I have a teaching load of ten periods. I've kept that up because I like teaching. I teach GCSE English on Thursdays. I doubt if I've taught 50 per cent of my lessons because of meetings and other commitments. That's not fair on the youngsters. Next year I must not put myself in that position.

Heads' teaching commitments

No teaching undertaken	3%
Regular teaching commitment	21%
Cover or substitution	7%
Both regular commitment plus cover	69%

(N = 123)

But does it really matter if heads teach or not and what effect, if any, is it likely to have on the school itself? As far as the heads themselves were concerned, most considered it was extremely important for a head to teach. When asked specifically to comment on this matter, only about one in eight respondents stated it was unimportant or 'not at all' important. Heads believed it to be important to teach, partly because, as was noted, 'it helps my sanity', ('on site psychotherapy' as another head put it!) and, 'it is the most enjoyable part of the week', but mostly because teaching gave heads credibility with the staff and personal contact with the students. Heads noted how necessary it was, especially in the light of curriculum initiatives such as GCSE and student-centred learning, to develop an empathy with staff so as to know, firsthand, their professional concerns; and to be seen as keeping abreast of factors affecting classroom practitioners. For some it was essential to teach 'to feel the pulse of the school', 'to share the experience of staff', and 'to remind oneself about the fundamental purpose of the school's existence'. Others felt that, for a variety of reasons, teachers expected heads to teach - ('as long as it wasn't in their department!') - and that it was an important factor affecting staff morale. One head noted how his expertise as a teacher was largely instrumental in obtaining a headship and, in his view, this expertise should not be allowed to atrophy but should be 'poured back to the benefit of the present generation of pupils'.

There was also a recognition, however, that teaching for heads was an act of self-indulgence. It may be justified by a variety of reasons but it was suggested that heads taught essentially because they enjoyed teaching, and regarded it as escapism ('the happy part of the week when I can see that I'm doing a good job - the idea of proving something to the staff is decreasingly valid'), or did it because it was a 'therapeutic indulgence which

gives me a morale boost!' whilst providing a release from administration and management. For one head it was the most relaxing time in the week.

The decision whether to teach depended very much on the heads themselves. It may be necessary to do some teaching if one's ability or credibility has to be proved, but, as one head asked, should it not be assumed that heads had already established their credibility as successful teachers to have gained the positions held? Others remarked that headship in the late '80s and '90s did not necessarily include teaching. Staff recognised that it was often more appropriate to employ teachers; heads were paid to lead and manage schools and not necessarily to teach children. As one head commented:

> The head's contribution to the overall development and well-being of the school is better made in contact with the teaching staff, parents, the community and pupils around the school, rather than with a small number of pupils in a classroom.

Heads were seen as having other means of relating to children and of operating as the leading professional. A regular teaching commitment was not necessarily important if heads had a high profile in the school and, it was suggested, this could be achieved, by such activities as, for example, school patrols, substitution and extra-curricular activities.

School Improvement

The original research project showed that the new heads initiated substantial changes in the schools. The groundwork for innovation was begun in the first year and changes in communication and organisation were frequently introduced. Working parties were usually established for major curricular and pastoral innovations and these began to be implemented in the second and third year of the new head's tenure. With the follow-up study it was possible to explore how these changes had developed and the extent to which the heads thought the school had improved. As has been pointed out earlier, it was not possible to obtain the views of staff in the case study schools, so what follows is a reflection of the heads' perspective.

In both the survey and the case study interviews, heads were asked how they thought the school had improved. The most frequent replies, mentioned by about one half of the cohort, concerned the curriculum. The heads believed that the schools now had a better, more balanced and more relevant curriculum, with options open to all pupils and a more effective cross-curricular approach.

Another major area of change concerned the staff. Heads said there was improved communication, consultation and active involvement by the staff, who were now perceived to be more open to new ideas, while better staff development and greater staff stability and cohesion had improved morale in some schools.

Pupil discipline and an improved pastoral care system was a major focus and improvements were mentioned in about a quarter of the schools. Several heads said teaching methods had changed: teacher-pupil relations were more open, and the school was a friendlier and happier place. Pupils were reported to be more confident, enthusiastic and responsive. The general atmosphere and ethos of the school had improved according to many of the heads.

About a quarter of the heads also said there were better relations between the school and the community. There was an improved school image and higher public esteem for the school. It was noticeable in the original study that new heads worked particularly hard on the public relations aspect of the school and the replies showed that this seemed to have had a positive effect five to six years later. The last of the areas mentioned concerned physical factors, such as the school buildings and facilities, which were seen as improvements by a quarter of the cohort.

A follow-up question asked the heads what kind of evidence was available to suggest that the school had improved. In reply about one half of the heads said that public examination results had improved over the five to six year period. Other quantifiable evidence offered by the heads included: the school being chosen by an increased number of parents as the first choice for their children when transferring from primary school and improved staying on rates at 16+. A further group of replies was concerned with improved pupil discipline such as a reduction in suspension, less disruption, less truancy and improved attendance.

Other factors which were less easy to quantify, but provided valuable feedback to heads, were the positive comments from parents and community, staff, pupils and governors. In addition, five schools mentioned positive reports following HMI inspections and another four had received good LEA reviews.

When asked how the school could continue to improve, 20 per cent of the heads said they wanted better public examination results in the future. The other replies covered all the factors mentioned above, such as improved community relations, staff morale, and the quality of teaching and learning. This suggests, as might be expected, that the schools had reached different positions on a variety of dimensions, having begun from different starting points five or six years earlier.

The present study was not designed as a school effectiveness project and no attempt was made to measure the changes statistically. However, it is certain that the arrival of a new head brings considerable change to a school, the effects of which can only really be judged some five years later. The data from the follow-up study indicate that many of the schools had improved in a variety of ways, at least according to the heads' perceptions of the situation.

The heads in the survey confirmed the view of the original study that the overwhelming majority of innovations in the first two years were initiated by the new heads themselves. In a few schools the deputies and other senior teachers were initiators, in addition to the head. This was frequently associated with the appointment of a new deputy. In contrast, where heads were unhappy with the perceived abilities of their senior management team, they saw themselves as lone initiators. The need to share the innovation load was one of the main reasons for wanting to appoint new deputies, preferably from outside the school.

Many heads believed that the school was ready for change:

> The ideas came completely from me. Curriculum, pastoral and management structures were all changed after 20 years.
>
> It was a good time to initiate change, particularly in the first six months, so I did. The school was somewhat stagnant, with staff looking for change. The merger of two schools pre-supposed change and everything was held up to the light.

Although overwhelmingly the heads were the main initiators, some stressed their role as facilitators for ideas initiated by staff:

> Changes were waiting for me to let them happen. I enabled the more confident staff to change things.

> Staff were involved throughout. My task has been to set their recommendations in a consistent and coherent policy. My influence has been large, but I believe in staff ownership of change.

A few of the heads talked about the pace of change and the need for a cautious approach in the early stages:

> I set out to change as little as possible as the school needed a period of stability. But there were some things which needed to change and staff wanted me to lead and make decisions.

> The changes came largely, but not solely from me. Some teachers seized the new opportunity to put ideas forward. I was persuaded to make haste slowly - on reflection I think this was probably a mistake.

A major constraint on change, as earlier noted, was the period of national industrial action by the teacher unions which affected the new heads from their second year in post. It became a period of 'marking time' as no meetings could be held and most heads felt that had slowed down the innovations and their development.

The heads were also asked for the main sources of change following their initial two years in post. The replies showed that the head and senior staff were still heavily involved, but the sources of new ideas were now widened to include middle management and other staff via working parties, staff meetings, curriculum committees, etc. External influences had also increased significantly, and some heads expressed concern about the number of initiatives from the DES and the Training Agency (another government agency). While many heads mentioned the effects of newly appointed staff such as deputies and heads of department, it is interesting to note that very few named governors, pupils or parents as initiators of change.

The general picture emerging from the present research was that after the early changes, initiated almost totally by the new head and involving the deputies as major change agents to implement the innovations, heads attempted to use a policy of encouraging staff to take initiatives. However, in some schools this had proved quite difficult to achieve. More recently, of course, all staff have had to adapt to the changes brought about by recent legislation.

Where heads felt they had been unable to implement all the changes they had wanted to, the main reason given, apart from industrial action, was the lack of able people in key positions, such as some heads of department who were reluctant in introduce curricula changes.

Vision

The term 'vision' has only recently been used in leadership studies. (an influential book was 'Leaders' by Bennis and Nanus 1985). Research on both effective schools and excellent business organisations has shown that possessing a vision and having the ability to articulate it are important characteristics of effective leaders. Vision is necessary as an overarching goal or long term guiding principle for improving the organisation and current initiatives need to be considered in relationship to the vision.

In the present study most heads were able to express a vision of what they would like the school to be. Only two of the 123 questionnaire respondents did not answer this question and a further four said they did not have a vision as such: 'No point: the rules of the government plus governors' powers reduce vision.' A few heads were very specific and simply said, 'I wish the school was an 11-18 mixed comprehensive', while another was even more to the point and just wanted a school which was 'oversubscribed'.

All the other heads provided descriptions of their 'ideal' school, which in many ways were remarkably similar. They saw a vision of the school as 'a community in its own right, closely allied to the larger community'. The notion of a school which served its community and in which all its members were able to achieve their full potential was stressed by most heads.

> The school as a community which has a clear goal, is committed to its achievement and is happy working towards this goal. The school must see itself as an equal partnership of pupils, parents and teachers.

> A school where students excel in everything, academically, socially and morally, well motivated staff and students, and the school buzzing with activity. Parents and people from the community and industry working together with the school.

> An academic powerhouse - this is what schools can be, rather than second-rate garages, typing pools, etc. with ancient and inadequate equipment.

> I want the school to be an example of the pursuit of excellence, in whatever form. A harmonious school where both staff and pupils reach their potential.

Key words such as happy, caring, supportive, secure, respect, busy and active, dominated the descriptions. Many heads wanted more student involvement and student centred learning as a preparation for adult life.

The visions centred on the ideal ethos or climate of a 'good comprehensive school'. This perhaps is not unexpected, given that the heads represent the 'Class of 82', most of whom have had teaching careers which spanned the last 20 years of comprehensive schooling in this country.

For most heads their vision was something they were moving towards, but had yet to achieve. A very small number thought they were already close to the ideal:

> In many ways it already measures up to my vision. Without wishing to sound arrogant, I think we are pretty near to my ideal. My wish is for the atmosphere to remain the same and the school roll to go up by another 200 pupils.

This section has shown how the new heads attempted to bring about improvements in their schools. Key elements in this process were their relations with the senior management team and the rest of the staff. Most heads possessed a vision of what they wanted the school to be like, but there were indications that they seemed reluctant to discuss this openly with governors, staff, students and parents. Research elsewhere strongly suggests that the most important means of improving an organisation is through its culture. This is most cogently argued by Schein (1987):

> Organisational cultures are created by leaders, and one of the most decisive functions of leadership may well be the creation, the management, and - if and when it becomes necessary - the destruction of culture. Culture and leadership, when one examines them closely, are two sides of the same coin, and neither can really be understood by itself. In fact, there is a possibility - underdeveloped in the leadership research - that the only thing of real importance that leaders do is to create and manage culture and that the unique talent of leaders is their ability to work with culture.

The research on effective schools shows the importance of school culture or ethos. The main task for the head is thus to provide the necessary vision and leadership to shape the culture of the school.

7. Concluding Comments

The previous NFER research had suggested that whatever preparation there might be for headship there was little substitute for the 'hands on' experience of actually being in post. Individuals who had been acting heads felt that this was a valuable experience but the fact that they were not the permanent head gave the role an element of unreality.

Given that there is no substitute for the experience of headship itself, it is nevertheless clear from the follow-up study that a number of the difficulties faced in their first years of headship could have been avoided, or at least minimised, if the heads had had better preparation. For example, it appears that a number of education authorities still do not provide new heads with an induction course - a particularly serious omission for heads taking up post from other authorities. It should be a matter of concern that it had taken a number of heads anything up to five years to become fully acquainted with LEA personnel and procedures. Some heads also reported that they had not been allowed into their new schools until the first day of their new appointment. For instance, one headteacher was quoted as saying:

> I picked up the keys from the previous head during the Christmas holidays and I began my headship on 6th January. Nobody contacted me from the LEA for three weeks; I might not have been there, for all they knew.

It would seem appropriate, again as recommended in the first study, for LEAs to consider appointing heads, wherever possible, at least a term in advance so that as heads-designate they could have a period of induction which would include visits to the new school.

For many heads involved in the NFER research, the training provision for senior managers

provided by LEAs was reported to be patchy and lacking in coherence. It was felt that there was an urgent need for all authorities to provide full and relevant programmes of training and support for senior staff but that management training and development must not be focused exclusively on heads and deputies. There was a need to make this available for all staff with managerial responsibilities. (The present DES School Management Task Force is due to make further recommendations which should provide a lead in these matters).

The educational system is undergoing a series of massive changes within a very short time-scale which means that most schools are suffering from 'innovation overload' or initiative fatigue. Many things that were taken for granted are now in a state of flux. A similar turbulent situation has occurred in the business world and it is interesting to note that Tom Peters' book is called 'Thriving on Chaos' (1988). He argues that successful companies have undergone a management revolution in order to cope with the constantly changing situation. Similarly, Peter Vaill in 'Managing as a Performing Art' (1989) uses the phrase 'permanent white water' as an analogy for the constantly changing state. One of the NFER heads captured the same notion which we used in the title of the follow up report:

> Heads used to steer a course: now we simply try to keep our raft afloat as we are carried through the rapids.

The advice given in the most recent management literature is that managers need to be leaders with a strong sense of vision which is made clear to all. Despite the futility expressed by the head above, a strategic plan for improvement is necessary, but it has to be sufficiently flexible to cope with the ever changing environment. Applied to schools, this suggests that the improvement process is gradual and continuous. This was mentioned by a few heads in the study:

> I do not see an end to the improvement I seek. No standard can be good enough. I do not believe that in any respect we can ever achieve ultimate success.

Research on school improvement in US high schools by Seashore-Louis and Miles (1990), showed that change is best achieved by a balance between pressure and support. It is obvious that if people are only kept under pressure they soon 'crack up'. But equally, if only support is provided, without any pressure, other priorities soon materialise and little will be achieved. Heads need to apply pressure in a variety of ways to indicate which are the areas of high priority, but this must also be accompanied by a great deal of support for staff. Despite some criticisms of the lack of support and training and anxieties about the enormous task that they had been asked to undertake, the heads in the NFER project, in the main, remained optimistic. If this is to continue, heads might need to heed the following advice: In the future heads must find a creative tension between their role as leading professional (educator) and their role as chief executive (administrator), and so avoid self-destructive conflict.

It is worth noting that in the United States principals seem to function largely as 'building administrators', yet the research on effective schools stresses the centrality of their role as 'instructional leaders' who focus on the curriculum and the teaching and learning process. Arguably, in the UK, most heads are already instructional leaders. As the NFER heads recognised, however, with the advent of LMS there will be increased pressure on them to move away from this aspect of their role.

There is evidence, then, from the follow-up study, that heads believed their role had changed considerably, that they were now much more concerned than hitherto with responding to external initiatives, with management and administration, with public relations and with staff support. But it was not just a change of emphasis: it was also a change of intensity. The volume of work had increased to the extent that, as the NAHT study had shown, some deputies were seriously questioning whether the extra salary of a head was worth the hassle. There was even a danger that eventually, 'many or all heads will reach saturation point and schools will collapse with exhaustion'. One can appreciate the feeling behind the head's comment: 'I often wonder why I do this job. A 17-hour day is common; 20 hours have been known'. However, he did go on to say: 'The only consolation is that I cannot think of any job I would rather have'.

The heads still talked of the satisfaction they gained from helping pupils, parents and staff to be more successful and of the enormous challenge of headship. The majority of heads still seemed to enjoy the job and continued to be enthusiastic about what it offered. But there was evidence of concern about the way the job had changed over the last few years. One head summed it up with the comment:

> I am more of a salesman, entrepreneur, opportunist, lawyer and accountant. It is not the job I came to originally

The overall feeling of trying to cope with ERA was summed up in a colourful metaphor by one head who said:

> Being a head in the 1990's is like competing in a marathon held on a high sand dune and carrying a heavy load. As the race develops the organisers reduce the number of feeding stations, increase the slope of the hill, and move the winning post. The racers have to be more efficient for they run on less calories. The specators do not appreciate the efforts of the runners and the race organisers demoralise them further by providing them with expensive and glossy training manuals. As they run they wonder whether their running shoes (which are wearing out) can be relaced. Perhaps they will make do with a second-hand pair of plimsolls from Woolworths!?

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